4 REFERRALS

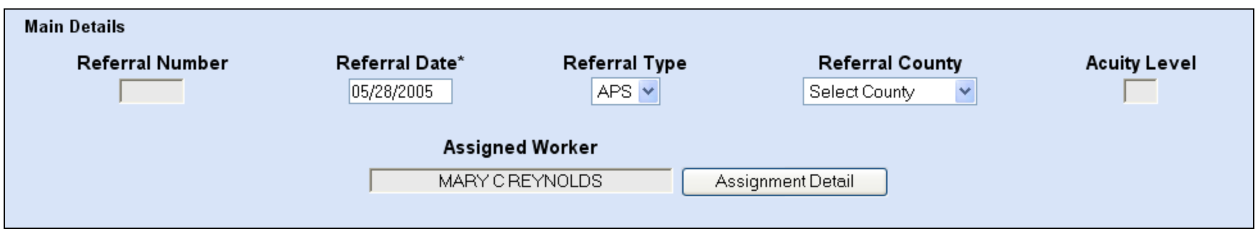
The referral detail page is used to enter and maintain information regarding Adult Protective Services (APS) or Adult Protective Information (API) referrals. A blank referral page can be accessed by clicking the New Referral button on the navigation menu. You can access the referral detail page for existing referrals using the Referral No field and button or by selecting a specific referral from your caseload or workload page.

The referral detail page contains eight sections: main details, referent, victim, allegations, person of interest, narrative summary, disposition and bottom buttons.

NOTE: Remember - you can navigate to each section throughout the referral detail page by using the page navigation button on the navigation menu.

4.1 MAIN DETAILS SECTION

The main details section of the referral detail page looks like this:



4.1.1 REFERRAL NUMBER

The referral number field Referral Number is not enterable. This field will display the referral number that was assigned by the system when a new APS or API referral is saved.

4.1.2 REFERRAL DATE

The referral date field Referral Date 05/20/2005 will default to the current date when a referral is added but can be modified to a past date, if necessary. Once the referral has been saved, the referral date can only be modified by your supervisor or Central Office staff.

4.1.3 REFERRAL TYPE

You can use the referral type drop down list Referral Type APS to select the appropriate type for the referral. The referral type will default to APS, but can be changed to API, if necessary. Once an API referral has been saved, the referral type can only changed back to APS by conversion through the Disposition section. Once a referral has been changed from API to APS, it cannot be changed back to APS.

4.1.4 Referral County

You can use the referral county drop down menu 

to select the county where the referral occurred.

4.1.5 Acuity Level

The acuity level field 

is not enterable. This field will default the acuity level determined by the system when a referral acuity assessment is completed. For APS referrals only, you must complete a referral acuity assessment within 30 days of the referral received date. The system will not allow you to complete a referral acuity assessment on an API referral.

4.1.6 Assigned Worker

The assigned worker field 

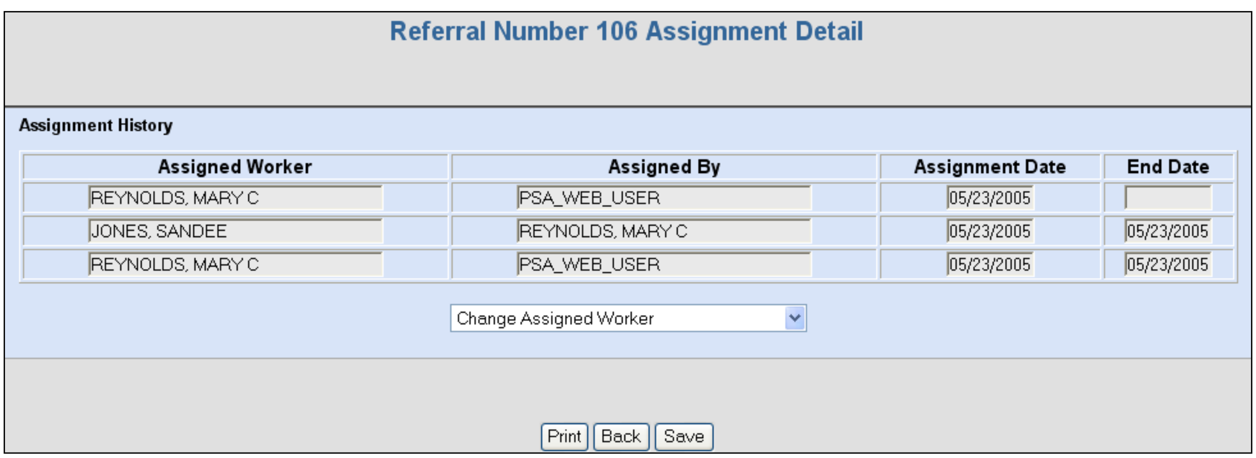
is not enterable. This field will default the name of the worker that is adding the referral. The assigned worker can be changed by clicking the 

button.

4.1.7 Assignment Detail Button

Clicking the 

button will take you to the assignment detail page for the referral. The assignment detail page enables you to transfer the referral to another worker. The assignment detail page looks like this:



Referral Number 106 Assignment Detail

Assignment History

Assigned Worker	Assigned By	Assignment Date	End Date
REYNOLDS, MARY C	PSA_WEB_USER	05/23/2005	
JONES, SANDEE	REYNOLDS, MARY C	05/23/2005	05/23/2005
REYNOLDS, MARY C	PSA_WEB_USER	05/23/2005	05/23/2005

Change Assigned Worker

Print Back Save

4.1.7.1 Assigned Worker

The assigned worker field 

is not enterable. This field will display the names of all workers that have been assigned to the referral. The most recent assigned worker will be at the top of the list.

4.1.7.2 Assigned By

The assigned by field [Assigned By: PSA_WEB_USER] is not enterable. This field will display the name of the worker that transferred the referral to the assigned worker.

4.1.7.3 Assignment Date

The assignment date field [Assignment Date: 04/28/2005] is not enterable. This field will display the date that the assigned worker was assigned to the referral.

4.1.7.4 End Date

The end date field [End Date] is not enterable. This field will display the date that the previous worker was released as the assigned worker for the referral.

4.1.7.5 Change Assigned Worker

You can transfer the referral to another worker using the change assigned worker drop down list. [Change Assigned Worker] All APS workers will be available on the list and when you select another worker and click the [Save] button, the new worker (and their supervisor) will receive an alert. The assignment detail page will also be updated with the new assignment history.

4.1.7.6 Print Button

Clicking the [Print] button will print the assignment detail page. A print window will open where you can confirm your print details. If everything is correct, click the [Print] button on the print window. Click the [Cancel] button on the print window if you do not wish to print the assignment detail page.

4.1.7.7 Back Button

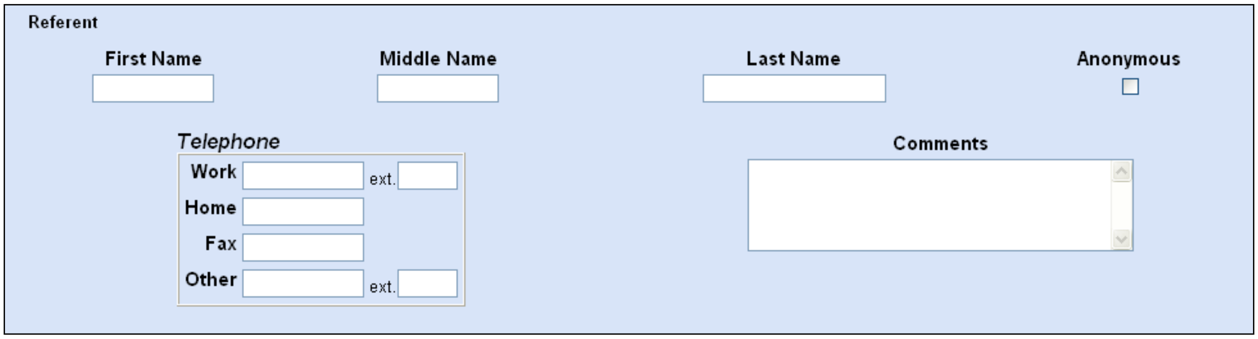
Clicking the [Back] button will take you back to the referral detail page. If you have made any changes to the page, you will receive a message asking if you would like to save the information before returning to the referral detail page.

4.1.7.8 Save Button

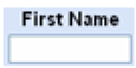
Clicking the [Save] button will save the changes you have made to the page. Once the information has been saved, you will receive a confirmation message.

4.2 REFERENT SECTION

The referent section of the referral detail page looks like this:

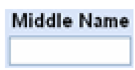


4.2.1 First Name

The first name field 

is where you can enter the first name of the person who contacted APS regarding the details of the referral.

4.2.2 Middle Name

The middle name field 

is where you can enter the middle name of the person who contacted APS regarding the details of the referral.

4.2.3 Last Name

The last name field 

is where you can enter the last name of the person who contacted APS regarding the details of the referral.

4.2.4 Anonymous

You can check the anonymous box 

to indicate that the person who contacted APS, regarding the details of the referral, wishes to remain anonymous.

4.2.5 Telephone

The telephone area 

provides several fields where you can enter telephone information for the person who contacted APS regarding the details of the referral.

4.2.5.1 Work and Extension

The work and extension fields 

are where you can enter a work phone number (and extension, if applicable) for the referent. If you do not enter the area code, the system will default the area code to 406. Work phone information can be entered or modified at any time.

4.2.5.2 Home

The home field 

is where you can enter the home phone number for the referent. If you do not enter the area code, the system will default the area code to 406. Home phone information can be entered or modified at any time.

4.2.5.3 Fax

The fax field 

is where you can enter the fax number for the referent. If you do not enter the area code, the system will default the area code to 406. Fax information can be entered or modified at any time.

4.2.5.4 Other and Extension

The other and extension fields 

are where you can enter any other phone number (and extension, if applicable) for the referent. This could be a cell phone number or an additional work phone number. If you do not enter the area code, the system will default the area code to 406. Other phone information can be entered or modified at any time.

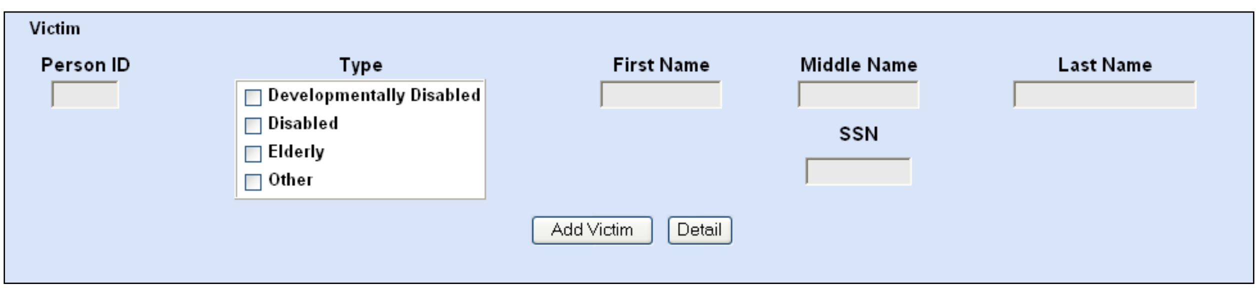
4.2.6 Comments

The comments box 

is a free-form text box where you can enter additional information regarding the referent.

4.3 VICTIM SECTION

The victim section of the referral detail page looks like this:



NOTE: The system will require a victim for APS referrals. Only one victim can be associated to an individual APS referral. The system will require the victim to have a first and last name, type(s), gender and an address (any type) prior to referral disposition.

4.3.1 Person ID

The person ID field 

is not enterable. This field will display the unique number that was assigned to the person when they were added and saved to the system.

4.3.2 Type

You can check the type check boxes ☐ to indicate the type of victim that is being entered on the referral. Multiple types can be selected (for example, the victim could be elderly and disabled.) A victim type will be required when the referral is dispositioned. The system will not allow a type of ELDERLY unless the victim is at least 60 years of age. The system will not allow a type (or types) to be selected until a victim has been added to the referral.

4.3.3 First Name

The first name field First Name is not enterable. This field will display the first name of the victim that was selected from person search results or person detail.

4.3.4 Middle Name

The middle name field Middle Name is not enterable. This field will display the middle name of the victim that was selected from person search results or person detail.

4.3.5 Last Name

The last name field Last Name is not enterable. This field will display the last name of the victim that was selected from person search results or person detail.

4.3.6 SSN

The SSN field SSN is not enterable. This field will display the social security number of the victim that was selected from person search results or person detail.

4.3.7 Add Victim Button

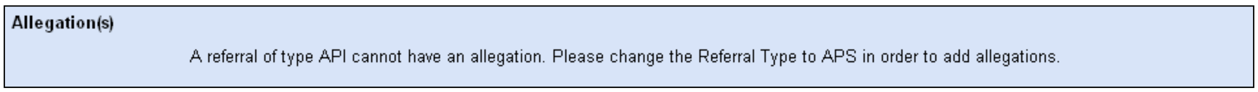
Clicking the Add Victim button will take you to the person search page (see Section 4.1). From the person search results page, you can either select an existing person or add a new person to the system and then add them as a victim.

4.3.8 Detail Button

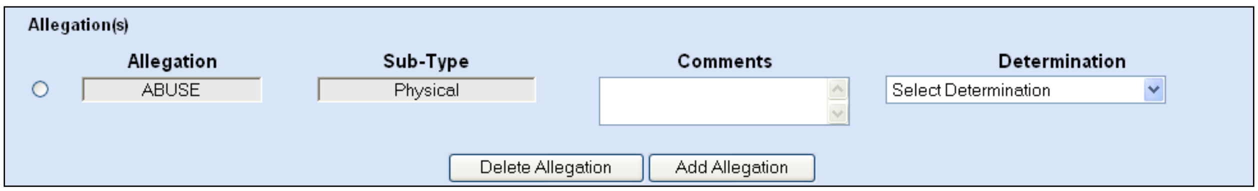
Clicking the Detail button will take you to the person detail page for the victim. You will be able to return to referral detail page, from the person detail page, if necessary.

4.4 ALLEGATION(S) SECTION

The system will not allow you to enter allegations on API referrals. The allegation(s) section of the referral detail page for an API referral looks like this:



The allegation(s) section of the referral detail page for an APS referral looks like this:



NOTE: APS referrals will require you to enter at least one allegation and sub-type (and subsequent determination). You can enter multiple allegations, if necessary.

4.4.1 Select Radio Button

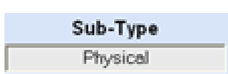
The select radio button  is used to select an individual allegation record. You must use the select radio button in order to delete an allegation record from the referral detail page.

4.4.2 Allegation

The allegation field 

is not enterable. This field will display the allegation that was selected on the add page.

4.4.3 Sub-Type

The sub-type field 

is not enterable. This field will display the allegation sub-type that was selected on the add page.

4.4.4 Comments

The comments box 

is a free-form text box where you can enter additional information regarding the allegation. Once an allegation has been added, comments can be entered or modified at any time.

4.4.5 DETERMINATION

You can use the determination drop down list 

to select the determination for each allegation. A determination will be required for each allegation when the referral is dispositioned.

4.4.6 DELETE ALLEGATION BUTTON

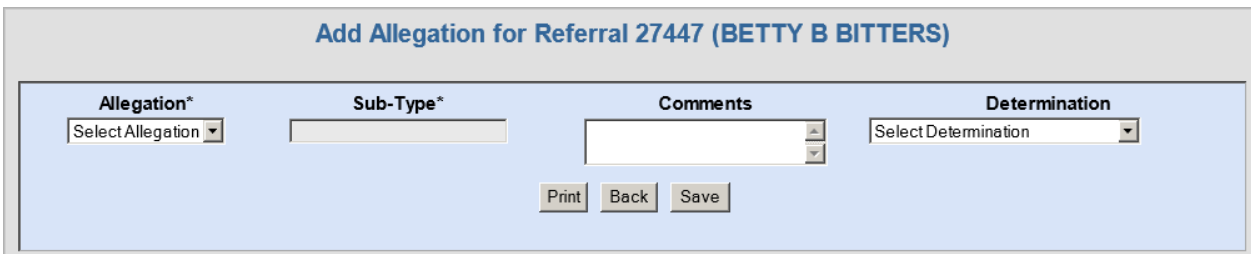
Clicking the 

button will delete the selected allegation from the referral detail page. Before clicking the delete allegation button, you must first select an allegation by clicking the appropriate select radio button.

4.4.7 ADD ALLEGATION BUTTON

Clicking the 

button will take you to the add page for allegation information. The add allegation page looks like this:



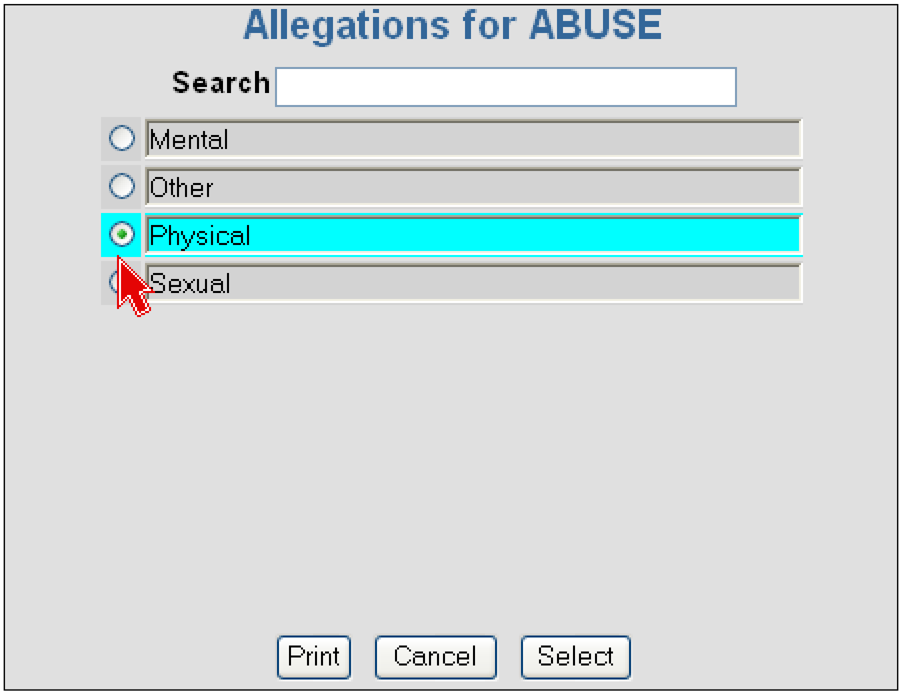
4.4.7.1 Allegation

You can use the allegation drop down list 

to select the appropriate allegation for the referral.

4.4.7.2 Sub-Type

When an allegation is selected from the drop down list, a page will display listing the valid sub-types for the selected allegation. Each allegation will require a sub-type. The page that will display looks like this (this is an example of the allegations for abuse sub-types):



Click your mouse in the radio button in front of the desired sub-type (this will highlight the selection, as shown above) and then click the Select button. This will add the selected sub-type to the add allegation page. Clicking the Cancel button will take you back to the add allegation page, but a sub-type will not be selected. Clicking the Print button will print the sub-type list.

4.4.7.3 Comments

The comments box 

is a free-form text box where you can enter additional information regarding the selected allegation and sub-type.

4.4.7.4 Determination

You can use the determination drop down list 

to select the determination for each allegation. A determination will not be required when you are entering the allegation, but a determination will be required for each allegation at the time the referral is dispositioned.

4.4.7.5 Back Button

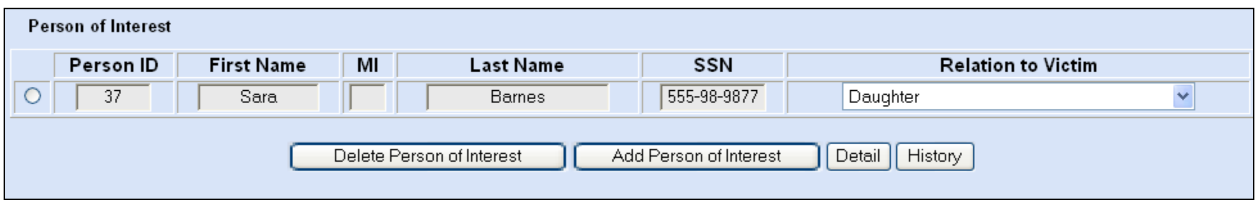
Clicking the Back button will take you back to the referral detail page. If you have made any changes to the page, you will receive a message asking if you would like to save the information before returning to the referral detail page.

4.4.7.6 Save Button

Clicking the Save button will save the additions you have made to the page. Once the information has been saved, you will receive a confirmation message. You will remain on the add allegation page so you can enter another allegation for the referral, if necessary. If you do not need to add another allegation, click the Back button to return to the referral detail page.

4.5 PERSON OF INTEREST SECTION

The person of interest section of the referral detail page looks like this:



NOTE: Multiple persons of interest can be added on an individual referral.

4.5.1 Select Radio Button

The select radio button ○ is used to select an individual person of interest record. You must use the select radio button in order to view detail or history for a person of interest or to delete a person of interest record from the referral detail page.

4.5.2 Person ID

The person ID field [Person ID: 37] is not enterable. This field will display the unique number that was assigned to the person when they were added and saved to the system.

4.5.3 First Name

The first name field [First Name] is not enterable. This field will display the first name of the person of interest that was selected from person search results or person detail.

4.5.4 MI

The MI (middle initial) field [MI] is not enterable. This field will display the middle initial of the person of interest that was selected from person search results or person detail.

4.5.5 Last Name

The last name field Last Name is not enterable. This field will display the last name of the person of interest that was selected from person search results or person detail.

4.5.6 SSN

The SSN field SSN 555-98-9877 is not enterable. This field will display the social security number of the person of interest that was selected from person search results or person detail.

4.5.7 Relation to Victim

You can use the relation to victim drop down list Relation to Victim Daughter to select the relationship of the person of interest to the victim on the referral. When a person of interest is selected from person search results or person detail, the relation to victim field will default to OTHER.

4.5.8 Delete Person of Interest Button

Clicking the Delete Person of Interest button will delete the selected person of interest from the referral detail page. Before clicking the delete person of interest button, you must first select a person of interest by clicking the appropriate select radio button.

4.5.9 Add Person of Interest Button

Clicking the Add Person of Interest button will take you to the person search page (see Section 4.1). From the person search results page, you can either select an existing person or add a new person to the system and then add them as a person of interest.

4.5.10 Detail Button

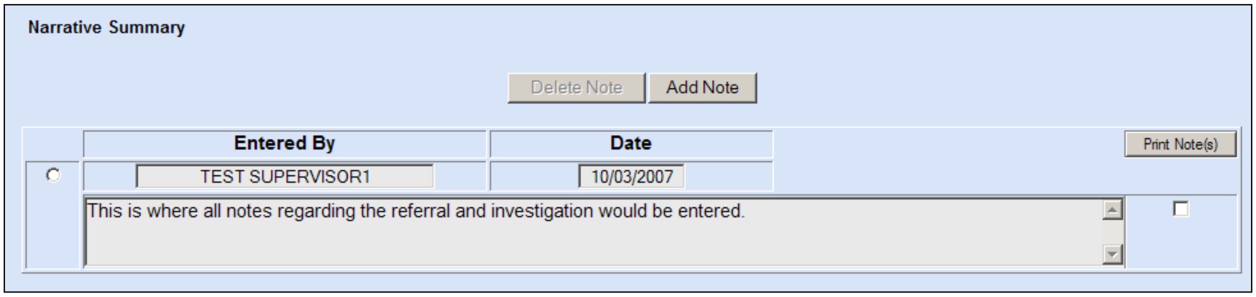
Clicking the Detail button will take you to the person detail page for the person of interest. Before clicking the detail button, you must first select a person of interest by clicking the appropriate select radio button. You will be able to return to referral detail page, from the person detail page, if necessary.

4.5.11 History Button

Clicking the History button will take you to the person of interest history page. This page will display, for this person of interest, a history of all open and dispositioned referrals where they are listed as the person of interest. Before clicking the history button, you must first select a person of interest by clicking the appropriate select radio button. You will be able to return to referral detail page, from the person of interest history page. See Section 7.5 for additional information on the person of interest history page.

4.6 NARRATIVE SUMMARY SECTION

The narrative summary section of the referral detail page looks like this:



NOTE: Narrative Summary details will display in reverse chronological order with the most current narrative summary listed first.

4.6.1 SELECT RADIO BUTTON

The select radio button is used to select an individual narrative summary record. You must use the select radio button in order to delete a narrative summary record from the referral detail page.

4.6.2 ENTERED BY

The entered by field 

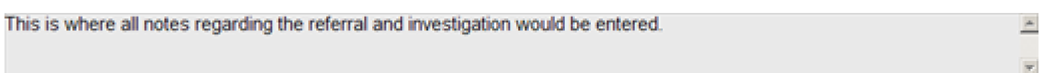
is not enterable. This field will display the name of the worker that added the notes. Any APS worker will have the ability to add notes to your referral, so this field will enable you to easily identify the worker that added the notes.

4.6.3 DATE

The date field 

is not enterable. This field will display the date the notes were added to the referral.

4.6.4 NOTES

The notes box 

is a free-form text box where you can enter the narrative summary notes. Notes can be added at any time. Once the notes have been stored, only supervisors and Central Office staff will have the authority to modify notes on a referral.

4.6.5 PRINT NOTE BUTTON AND CHECK BOX

The print note button and check box 

enable you to select a specific note (or notes) to print.

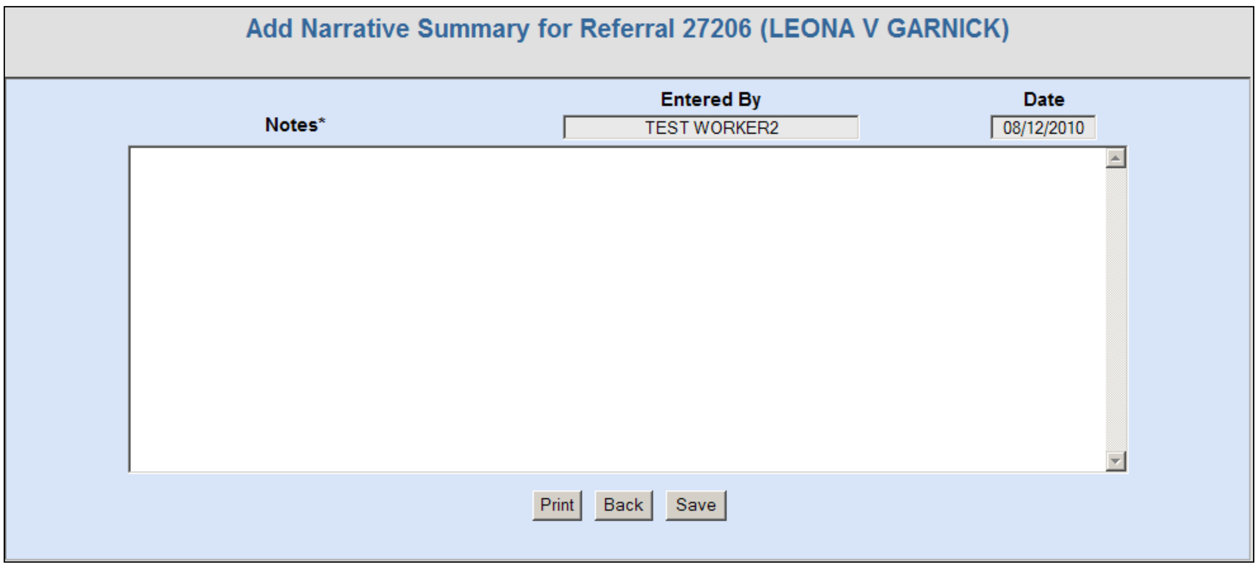
4.6.6 DELETE NOTE BUTTON

Clicking the Delete Note button will delete the selected narrative summary notes from the referral detail page. Before clicking the delete note button, you must first select a narrative summary note by clicking the appropriate select radio button.

NOTE: Only supervisors and Central Office staff will have the authority to delete notes from a referral.

4.6.7 ADD NOTE BUTTON

Clicking the Add Note button will take you to the add page where narrative summary notes can be entered. The 'add narrative summary' page looks like this:



NOTE: Notes can continue to be entered after referral disposition.

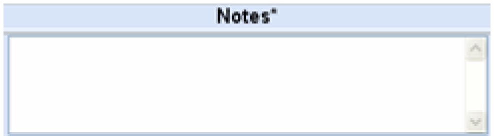
4.6.7.1 Entered By

The entered by field Entered By PSA_WEB_USER is not enterable. This field will default the name of the worker that is adding the narrative summary notes to the referral.

4.6.7.2 Date

The date field Date 05/20/2005 is not enterable. This field will default the date the narrative summary notes are being entered.

4.6.7.3 Notes

The notes box 

is a free-form text box where narrative summary notes can be entered.

4.6.7.4 Back Button

Clicking the Back button will take you back to the referral detail page. If you have made any changes to the page, you will receive a message asking if you would like to save the information before returning to the referral detail page.

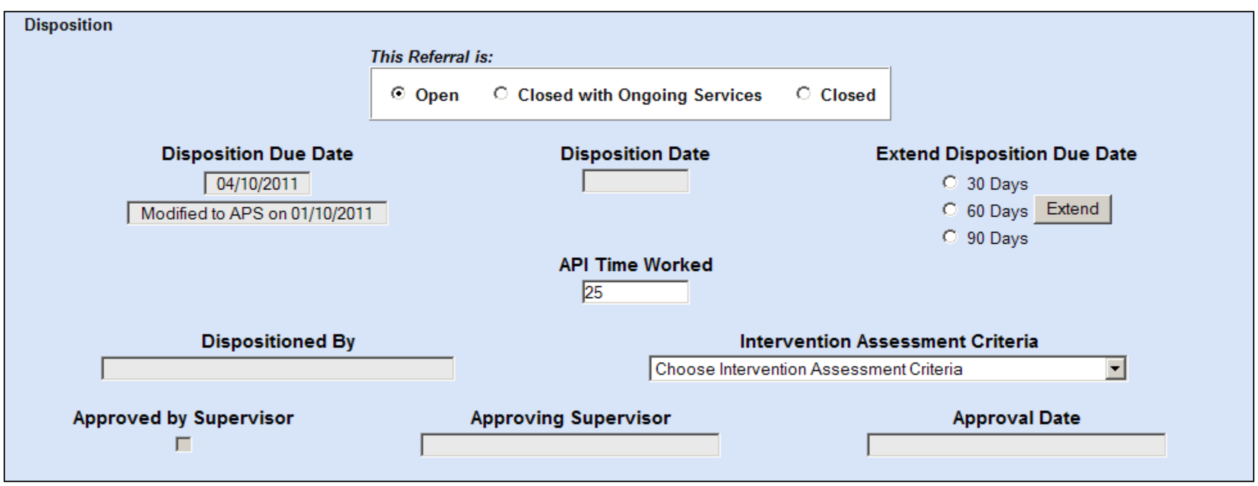
4.6.7.5 Save Button

Clicking the Save button will save the additions you have made to the page. Once the information has been saved, you will receive a confirmation message. You will remain on the 'add narrative summary' page so you can enter more notes for the referral, if necessary. If you do not need to add more notes, click the Back button to return to the referral detail page.

4.7 DISPOSITION SECTION

Once a referral is dispositioned, the referral details will be locked for the worker role. At that time, changes to the referral details can only be made by someone with a supervisor role. The same is true once the referral disposition has been approved by the supervisor.

The disposition section of the referral detail page looks like this:



4.7.1 DISPOSITION BUTTONS

When you disposition a referral, the system will verify that all required information has been entered on the referral detail page before allowing you to select one of the closed radio buttons.

4.7.1.1 Open Radio Button

The ◉ **Open** button will be selected automatically when a referral is added to the system. The open radio button will remain selected until referral disposition to indicate the referral is still open.

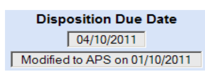
4.7.1.2 Closed with Ongoing Services Radio Button

Click the ○ **Closed with Ongoing Services** button if the referral is ready to be closed and there **is** going to be ongoing APS involvement with the victim. Clicking this button indicates that a case management will be opened and ongoing services are going to be provided to the victim on the referral. This button cannot be selected for API referrals, unless the API referral is being converted to an APS referral.

4.7.1.3 Closed Radio Button

Click the ○ **Closed** button if the referral is ready to be closed and there is **not** going to be ongoing APS involvement with the victim. Clicking this button indicates that **no** case management will be opened, **no** ongoing services are going to be provided to the victim on the referral, and the referral is **not** going to be converted to an APS referral. This button can be used to close APS referrals, and will always be used to close API referrals, unless converting an API referral to an APS referral.

4.7.2 Disposition Due Date

The disposition due date field 

is not enterable. This date is calculated by the system based on the referral received date. For APS referrals, the disposition due date will initially be 90 days from the referral received date, but the date can be extended for an additional 30, 60 or 90 days by your supervisor or by Central Office staff. For API referrals, the disposition due date will be 30 days. At the end of 30 days, the API referral should be closed or converted to APS. When an API referral is converted to APS, the disposition due date will be recalculated to 90 days from the conversion date.

If a referral is converted from API to APS, the text box under the disposition due date box will display the conversion date.

4.7.3 Disposition Date

The disposition date field 

is not enterable. This date will populate with the current date when the referral disposition is saved. Once a referral has been dispositioned, information on the referral detail page can only be modified by your supervisor and Central Office staff. If this is an API referral that has been converted to APS, then entry will still be permitted until the APS referral is dispositioned.

4.7.4 Extend Disposition Due Date Buttons

Only your supervisor and Central Office will have the authority to extend the disposition due date on a referral. If special circumstances exist on a specific referral, and you need to have the disposition due date extended, please discuss these circumstances with your supervisor.

4.7.4.1 30 Days Radio Button

Clicking the ○ 30 Days button and then clicking the Extend button will extend the disposition due date by 30 days.

4.7.4.2 60 Days Radio Button

Clicking the ○ 60 Days button and then clicking the Extend button will extend the disposition due date by 60 days.

4.7.4.3 90 Days Radio Button

Clicking the ○ 90 Days button and then clicking Extend button will extend the disposition due date by 90 days.

4.7.4.4 Extend Button

The Extend button works in conjunction with the 30, 60 and 90 day extend disposition due date radio buttons.

4.7.5 API Time Worked

The API Time Worked [25] field must be entered at the time of closure for API referrals and at the time of conversion of an API referral to an APS referral. Time should be entered as total minutes (whole minutes) spent on the API referral and can be rounded up. When saving a referral, you will receive messages asking you to verify if API Time Worked is correct and to remind you to update Medicaid, if necessary.

If the referral is transferred to another worker, the API Time Worked will change to blank so the new worker can enter their time worked on the referral.

4.7.6 Dispositioned By

The dispositioned by field Dispositioned By [ ] is not enterable. This field will default the name of the worker that dispositioned the referral.

4.7.7 Intervention Assessment Criteria

You can use the intervention assessment criteria drop down list Intervention Assessment Criteria [Choose Intervention Assessment Criteria] to indicate the appropriate closure factor when you are ready to disposition a referral. The Intervention Assessment Criteria drop down list will be different for APS referrals and API referrals. If converting an API referral to an APS referral, the Intervention Assessment Criteria must be "Modified to APS".

4.7.8 Approved by Supervisor

As a supervisor, you can check the Approved by Supervisor box if you agree with the intervention assessment criteria and would like to approve the referral for closure. If you are entering the referral disposition as a supervisor, Central Office can approve the referral for closure at the supervisor level.

4.7.9 Approving Supervisor

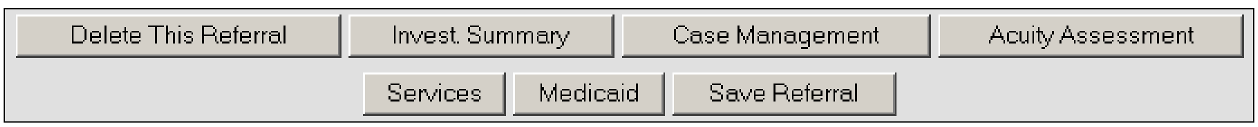
The approving supervisor field Approving Supervisor is not enterable. This field will default the name of the supervisor that approved the referral for closure.

4.7.10 Approval Date

The approval date field Approval Date is not enterable. This field will default the date the supervisor approved the referral for closure.

4.8 REFERRAL DETAIL BOTTOM BUTTONS

There are several buttons located at the bottom of the referral detail page.



The functionality for each of these buttons is as follows:

4.8.1 Delete This Referral Button

Clicking the Delete This Referral button will delete the referral from the system. <u>All information entered on the referral detail page will be deleted (however, persons added to the system as a result of the referral process will not be deleted)</u>. This function enables workers to have duplicate referrals, or referrals that were entered in error, removed from the system.

NOTE: Only supervisors and Central Office staff will have the authority to delete referrals from the system.

4.8.2 Investigative Summary Button

Clicking the Invest. Summary button will open the Investigative Summary document. See section 7.2.1 for additional information regarding the Investigative Summary.

4.8.3 Case Management Button

Clicking the Case Management button will take you to the case management page. The victim on the referral (that was dispositioned with "closed with ongoing services) will be opened as a client on a case. This button can be selected at any time. If the victim on the referral is already on an open case you will be taken to the Case Management page for the existing case. A new case will not be created.

4.8.4 ACUITY ASSESSMENT BUTTON

Clicking the Acuity Assessment button will take you to the acuity assessment page where the acuity level can be set for the referral. The acuity level must be set within 30 days of the referral received date for APS referrals. The acuity level can be updated at any time, if the circumstances on the referral change. Acuity assessments do not need to be completed for API referrals.

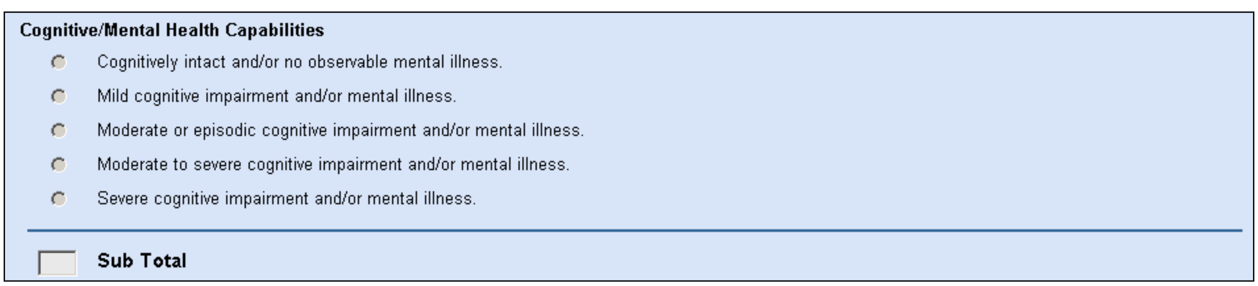
The acuity assessment page contains ten factors and a results/approval section. Total acuity points are calculated based on your selection for each factor (a selection is required for each factor.) Sections 1 – 7 measure risk and sections 8 – 10 measure workload. Factor points range from 1 – 5 for factors 1 through 9 and 5 – 25 for factor 10. Total points of 14 – 32 will set an acuity level of 1, total points of 33 – 51 will set an acuity level of 2, and total points of 52 – 70 will set an acuity level of 3 for the referral.

The name of the victim on the referral will display at the top of the acuity assessment page so you (and the approving supervisor) can identify who the acuity is being completed for.

NOTE: Remember - you can navigate to each section throughout the acuity assessment page by using the page navigation button on the navigation menu.

4.8.4.1 Cognitive/Mental Health Capabilities

The cognitive/mental health capabilities section of the acuity assessment page looks like this:


Cognitive/Mental Health Capabilities

- Cognitively intact and/or no observable mental illness.
- Mild cognitive impairment and/or mental illness.
- Moderate or episodic cognitive impairment and/or mental illness.
- Moderate to severe cognitive impairment and/or mental illness.
- Severe cognitive impairment and/or mental illness.

Sub Total

Click the radio button next to the appropriate level of cognitive/mental health capabilities for the victim on the referral.

4.8.4.2 Physical Capabilities

The physical capabilities section of the acuity assessment page looks like this:

Physical Capabilities

- No physical impairment.
- Mild physical impairment and minimal assistance needed.
- Moderate or episodic physical impairment and moderate assistance needed.
- Moderate to severe physical impairment and substantial assistance needed.
- Severe physical impairment and total assistance needed.

Sub Total

Click the radio button next to the appropriate level of physical capabilities for the victim on the referral.

4.8.4.3 Physical Environment

The physical environment section of the acuity assessment page looks like this:

Physical Environment

- Adequate. No pertinent physical environment concerns.
- Acceptable but slightly soiled and/or cluttered.
- Functioning utilities but moderately soiled, cluttered, odorous and/or in need of minor repairs.
- Limited utilities, very soiled, cluttered, unsanitary and/or in need of major repairs.
- Lack of utilities, filthy, unsound, unhealthy, unsafe and/or is non repairable. Homeless and community shelter is unavailable. Alternate housing is necessary.

Sub Total

Click the radio button next to the appropriate description of the physical environment for the victim on the referral.

4.8.4.4 Ability to Function in Environment

The ability to function in environment section of the acuity assessment page looks like this:

Ability to Function in Environment

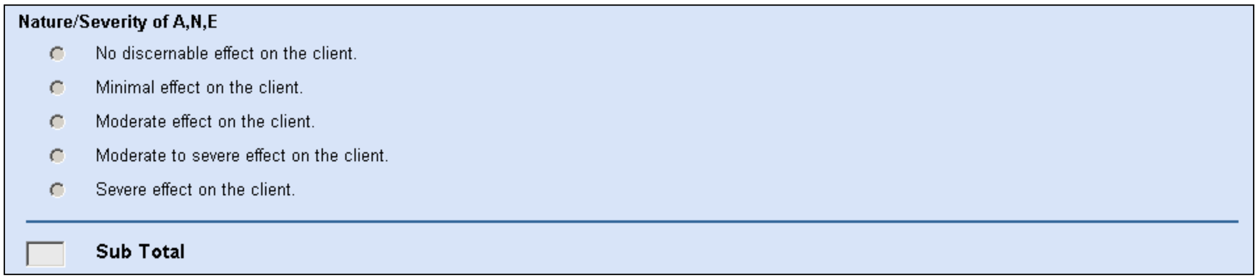
- The client, caregivers and/or supports are meeting 100% of the care needs.
- The client, caregivers and/or supports are meeting 75% to 100% of the care needs.
- The client, caregivers and/or supports are meeting 50% to 75% of the care needs.
- The client, caregivers and/or supports are meeting 25% to 50% of the care needs.
- The client, caregivers and/or supports are meeting less than 25% of the care needs.

Sub Total

Click the radio button next to the appropriate description of the victim's ability to function in their environment.

4.8.4.5 Nature/Severity of A, N, E

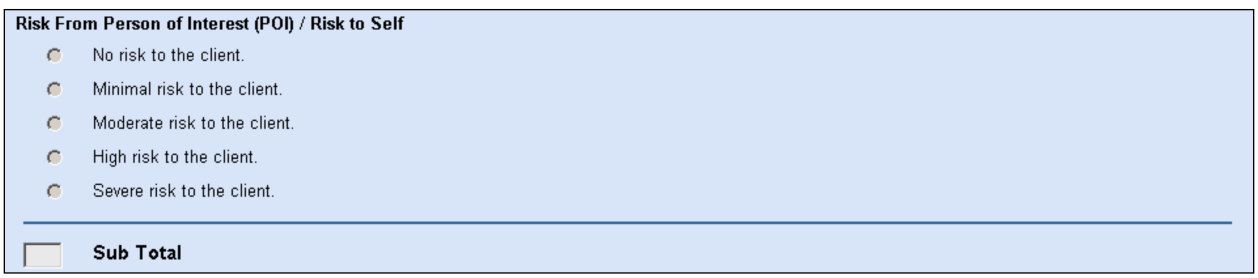
The nature/severity of A, N, E section of the acuity assessment page looks like this:



Click the radio button next to the appropriate level of abuse, neglect or exploitation for the victim on the referral.

4.8.4.6 Risk from Person of Interest (POI)/Risk to Self

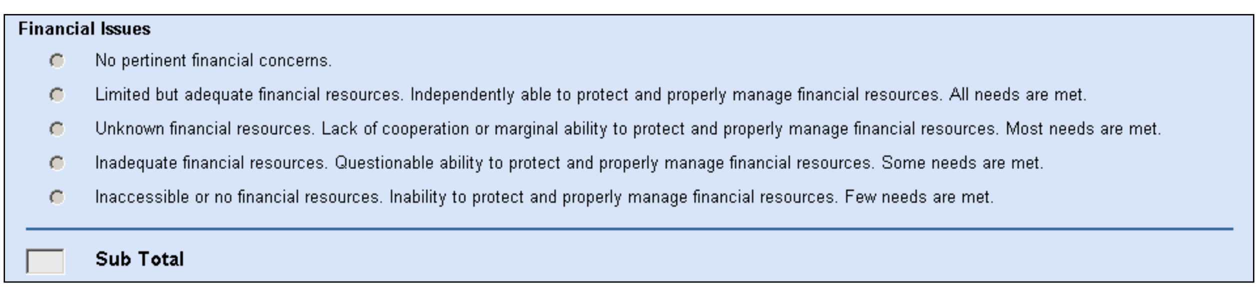
The risk from person of interest (POI)/risk to self section of the acuity assessment page looks like this:



Click the radio button next to the appropriate level of risk between the person(s) indicated as the person(s) of interest on the referral and the victim on the referral, as well as the risk of the victim to themselves.

4.8.4.7 Financial Issues

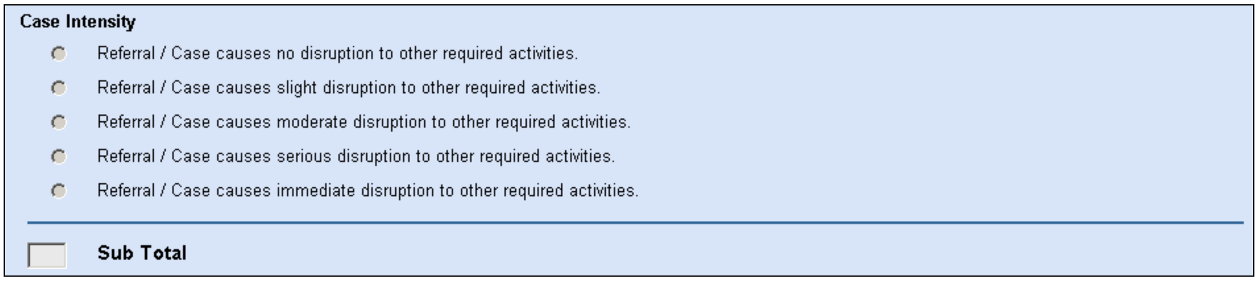
The financial issues section of the acuity assessment page looks like this:



Click the radio button next to the appropriate amount of financial issues for the victim on the referral.

4.8.4.8 Case Intensity

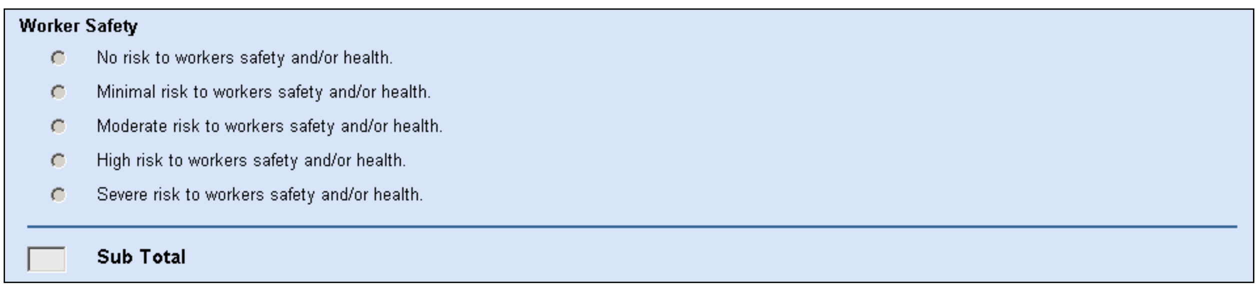
The case intensity section of the acuity assessment page looks like this:



Click the radio button next to the appropriate potential for disruption to other required activities caused by this referral.

4.8.4.9 Worker Safety

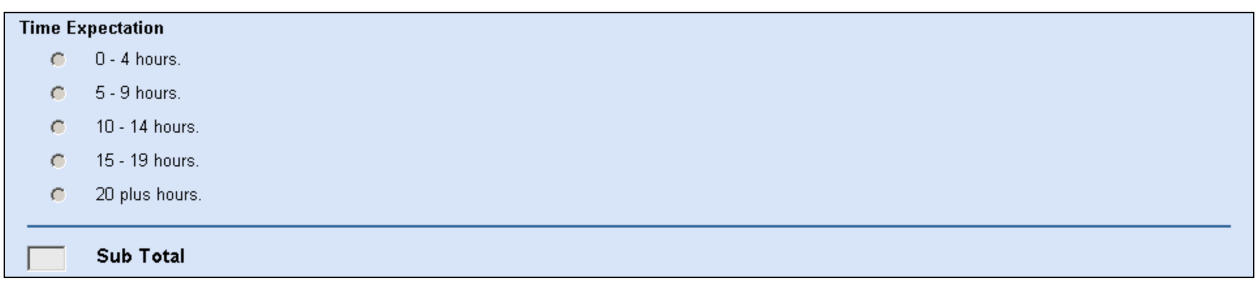
The worker safety section of the acuity assessment question page looks like this:



Click the radio button next to the appropriate worker safety considerations for the referral.

4.8.4.10 Time Expectation

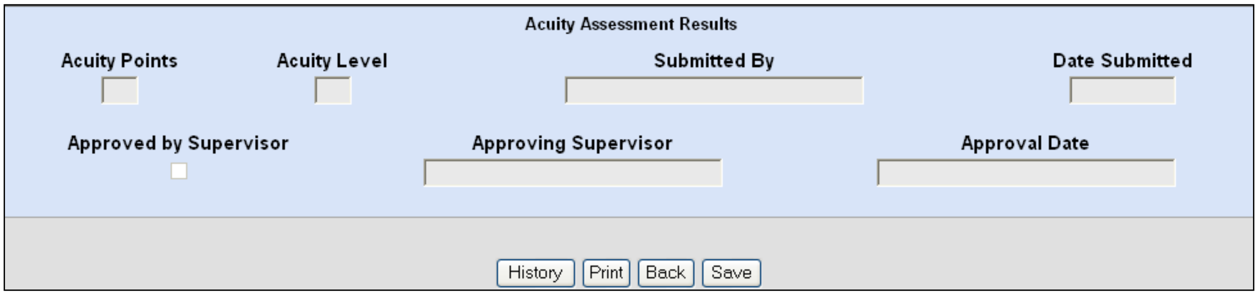
The time expectation section of the acuity assessment page looks like this:



Click the radio button next to the appropriate number of expected hours of worker involvement for the referral.

4.8.4.11 Acuity Assessment Results

The acuity assessment results section of the acuity assessment page looks like this:



4.8.4.11.1 Acuity Points

The acuity points field 

is not enterable. This field will default the accumulative points from each of the ten factors listed on the acuity assessment page.

4.8.4.11.2 Acuity Level

The acuity level field 

is not enterable. This field will default the appropriate acuity level based on the total acuity points.

4.8.4.11.3 Submitted By

The submitted by field 

is not enterable. This field will default the name of the worker that submitted the acuity assessment.

4.8.4.11.4 Date Submitted

The date submitted field 

is not enterable. This field will default the date the worker submitted the acuity assessment for approval.

4.8.4.11.5 Approved by Supervisor

As a supervisor, you can check the 

box if you agree with the worker's acuity assessment and would like to approve the acuity assessment. If you are submitting the acuity assessment as a supervisor, Central Office can approve the acuity assessment at the supervisor level. Once the acuity assessment has been completed, the acuity level cannot be changed. If circumstances of the referral necessitate a change in acuity level, then a new acuity assessment must be completed and submitted for approval.

4.8.4.11.6 Approving Supervisor

The approving supervisor field 

is not enterable. This field will default the name of the supervisor that approved the acuity assessment.

4.8.4.11.7 Approval Date

The approval date field Approval Date is not enterable. This field will default the date the supervisor approved the acuity assessment.

4.8.4.12 Acuity Assessment Bottom Buttons

4.8.4.12.1 History Button

Clicking the History button will take you to the acuity assessment history page for the referral. The acuity assessment history page will display a list of all acuity assessments that have been completed and approved for the referral. See section 7.3 for additional information on viewing acuity assessment history for a referral.

4.8.4.12.2 Print Button

Clicking the Print button will print the acuity assessment page. A print window will open where you can confirm your print details. If everything is correct, click the Print button on the print window. Click the Cancel button on the print window if you do not wish to print the acuity assessment page.

4.8.4.12.3 Back Button

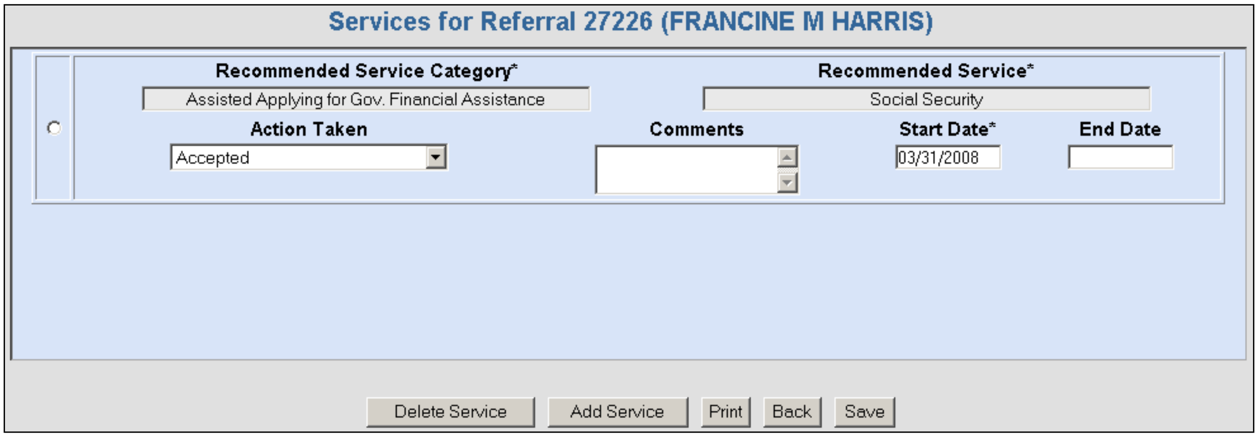
Clicking the Back button will take you back to the referral detail page. If you have made any additions to the page, you will receive a message asking if you would like to save the information before returning to the referral detail page.

4.8.4.12.4 Save Button

Clicking the Save button will save your acuity assessment results and an alert will be sent to your supervisor requesting approval. The system will not allow you to save your assessment until all factors have a radio button selected.

4.8.5 SERVICES BUTTON

Clicking the Services button will take you to the services page. The services page looks like this:



4.8.5.1 Select Radio Button

The select radio button  is used to select an individual service record. You must use the select radio button in order to delete a service record from the services page.

4.8.5.2 Recommended Service Category

The recommended service category field 

is not enterable. This field will display the recommended service category that was selected on the add page.

4.8.5.3 Recommended Service

The recommended service field 

is not enterable. This field will display the recommended service that was selected on the add page.

4.8.5.4 Action Taken

The action taken field 

will display the action taken that was selected on the add page. Once a service has been added, the action taken can be entered or modified directly on the services page.

4.8.5.5 Comments

The comments box 

is a free-form text box. This box will display comments that were entered on the add page. Once a service has been added, the comments can be entered or modified directly on the services page.

4.8.5.6 Start Date

The start date field 

will display the start date that was entered on the add page. Once a service has been added, the start date can be modified directly on the services page. You may initially enter a recommended service with an action taken of “accepted” and the date the service was accepted by the client. At a later date, the service may actually be “implemented” and the start date could be changed to identify when the service actually began.

4.8.5.7 End Date

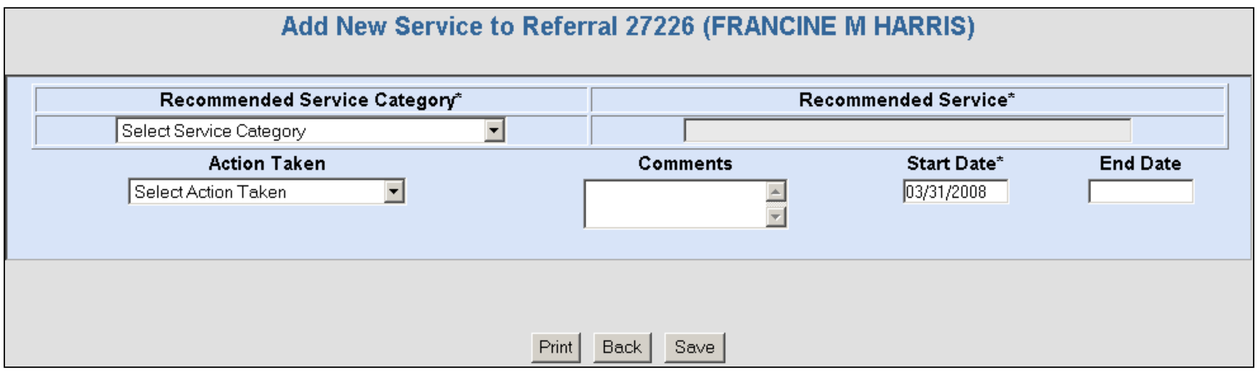
The end date field End Date 05/23/2005 will display the end date for the recommended service. The end date can be entered on the add page, but once a service has been added, the end date can also be entered or modified directly on the services page.

4.8.5.8 Delete Service Button

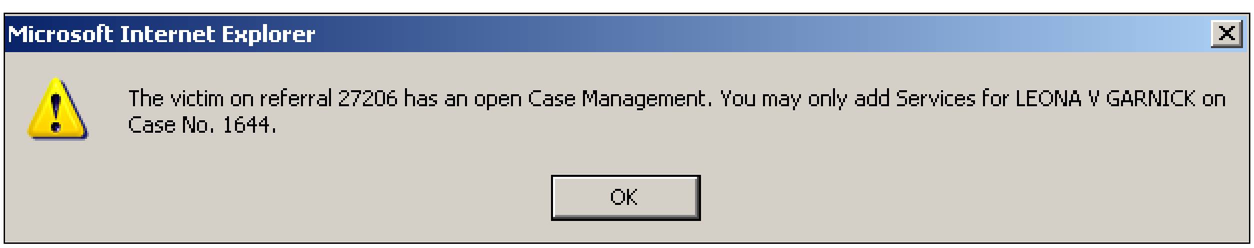
Clicking the Delete Service button will delete the selected service from the services page. Before clicking the delete service button, you must first select a service by clicking the appropriate select radio button.

4.8.5.9 Add Services Button

Clicking the Add Service button will take you to the add page for recommended service information. The 'add new service' page looks like this:



NOTE: You cannot add services to a referral if the victim on that referral is already associated to an open case management. Because services must be associated with the case, you will receive a message that looks like this:



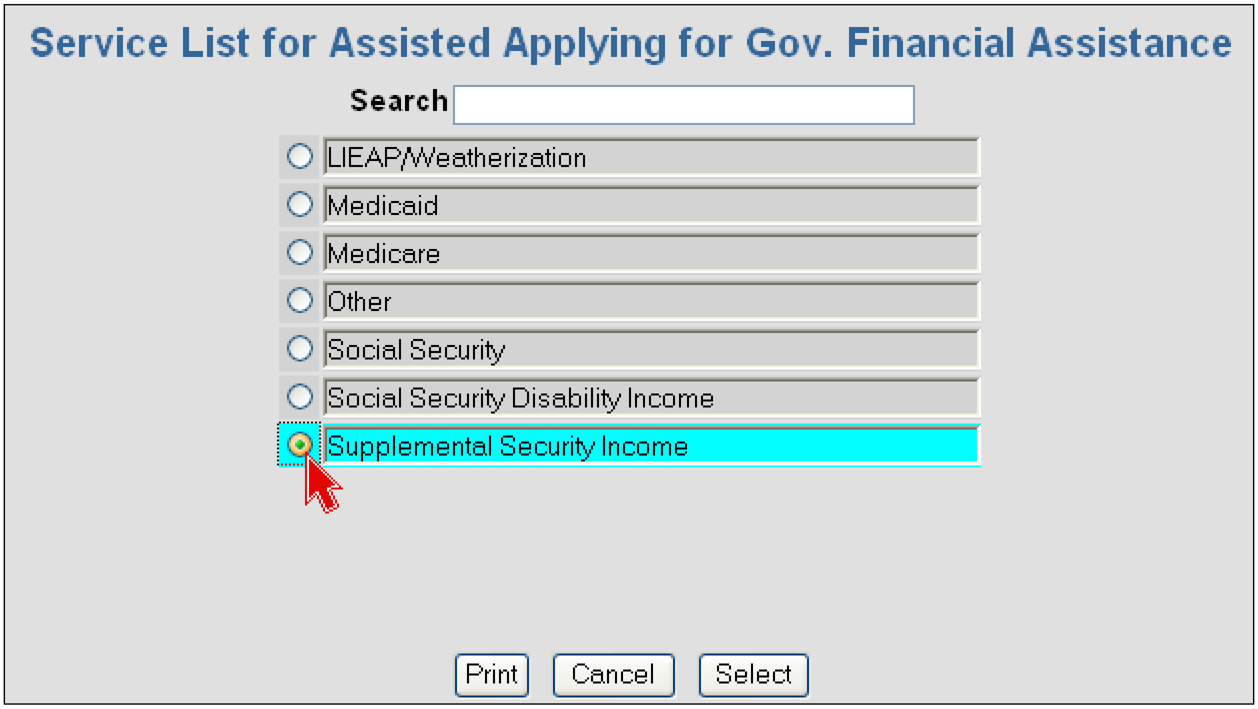
4.8.5.9.1 Recommended Service Category

You can use the recommended service category drop down list to select the recommended service category for the service.

4.8.5.9.2 Recommended Service

The recommended service field [Recommended Service*] is not enterable. When a recommended service category is selected from the recommended service category drop down list, a page will display listing the valid services for the selected category.

The page that will display looks like this (this is an example of the service list for the category of "Assisted Applying for Gov. Financial Assistance"):



Click your mouse in the radio button in front of the desired service (this will highlight the selection, as shown above) and then click the Select button. This will add the selected service to the add new service page. Clicking the Cancel button will take you back to the add new service page, but a service will not be selected. Clicking the Print button will print the service list.

4.8.5.9.3 Action Taken

You can use the action taken drop down list [Action Taken: Implemented-Lack of Resources] to select the appropriate action taken for the service.

4.8.5.9.4 Comments

The comments box Comments is a free-form text box where you can enter general comments regarding the recommended service or action taken.

4.8.5.9.5 Start Date

The start date field Start Date* will default the date the service is being entered into the system. You can change the start date to a past date, if necessary.

4.8.5.9.6 End Date

The end date field End Date is where you can enter the end date for the recommended service. An end date can be entered on the add page if you are entering a service that has already been provided. Once the service has been added, the end date can also be entered or modified directly on the services page.

4.8.5.9.7 Print Button

Clicking the Print button will print the services page. A print window will open where you can confirm your print details. If everything is correct, click the Print button on the print window. Click the Cancel button on the print window if you do not wish to print the services page.

4.8.5.9.8 Back Button

Clicking the Back button will take you back to the services page. If you have made any changes to the page, you will receive a message asking if you would like to save the information before returning to the services page.

4.8.5.9.9 Save Button

Clicking the Save button will save the additions you have made to the page. Once the information has been saved, you will receive a confirmation message. You will remain on the 'add new service' page so you can enter another service, if necessary. If you do not need to add another service, click the Back button to return to the services page.

4.8.5.10 Print Button

Clicking the Print button will print the services page. A print window will open where you can confirm your print details. If everything is correct, click the Print button on the print window. Click the Cancel button on the print window if you do not wish to print the services page.

4.8.5.11 Back Button

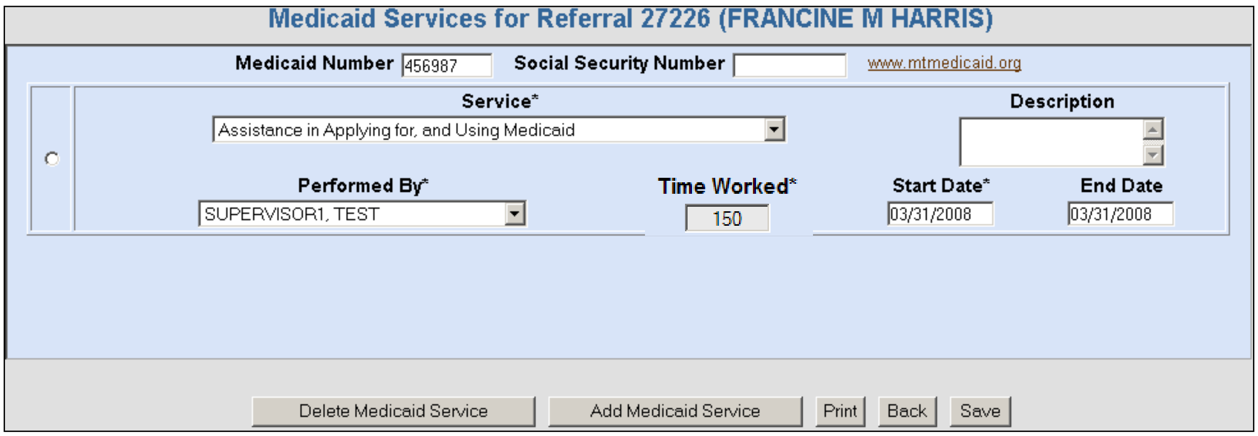
Clicking the Back button will take you back to the referral page. If you have made any changes to the page, you will receive a message asking if you would like to save the information before returning to the case management page.

4.8.5.12 Save Button

Clicking the Save button will save the changes you have made to the page. Once the information has been saved, you will receive a confirmation message.

4.8.6 MEDICAID BUTTON

Clicking the Medicaid button will take you to the Medicaid services page. The Medicaid services page looks like this:



NOTE: Either the client's Medicaid number **or** Social Security Number must be entered in order to add Medicaid services.

4.8.6.1 Medicaid Number

The Medicaid number field **Medicaid Number** 123456 is where you can enter the client's Medicaid number (if known).

4.8.6.2 Social Security Number

The Social Security Number field **Social Security Number** is where you can enter the client's social security number. If the SSN was entered on the person detail page, the system will default the SSN into this field.

4.8.6.3 Montana Medicaid Provider Web Portal Link

Clicking the Montana Medicaid link www.mtmedicaid.org will open another browser window and display the internet page for the Montana Medicaid Provider Web Portal. The Web Portal will enable you to perform Medicaid and MHSP eligibility and claims status queries. You must download, print and complete an access request form. For additional assistance with the Web Portal, contact the DPHHS Help Desk at 444-9500.

4.8.6.4 Select Radio Button

The select radio button  is used to select an individual Medicaid service record. You must use the select radio button in order to delete a Medicaid service record from the Medicaid services page.

4.8.6.5 Service

The service field 

will display the Medicaid service that was selected on the add page. Once a Medicaid service has been added, the service can be modified directly on the Medicaid services page.

4.8.6.6 Description

The description field 

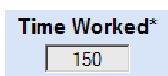
is a free-form text box. This box will display comments that were entered on the add page. Once a Medicaid service has been added, the comments can be entered or modified directly on the Medicaid services page.

4.8.6.7 Performed By

The performed by field 

will display the name of the worker that was selected on the add page. Once a Medicaid service has been added, the performed by field can be modified directly on the Medicaid services page.

4.8.6.8 Time Worked

The time worked field 

will display the time worked that was entered on the add page. Once a Medicaid service has been added, the time worked can be modified directly on the Medicaid services page. Time worked must be entered in minutes.

4.8.6.9 Start Date

The start date field 

will display the start date that was entered on the add page. Once a Medicaid service has been added, the start date can be modified directly on the Medicaid services page.

4.8.6.10 End Date

The end date field 

will display the end date for the Medicaid service. The end date can be entered on the add page, but once a Medicaid service has been added, the end date can also be entered or modified directly on the Medicaid services page.

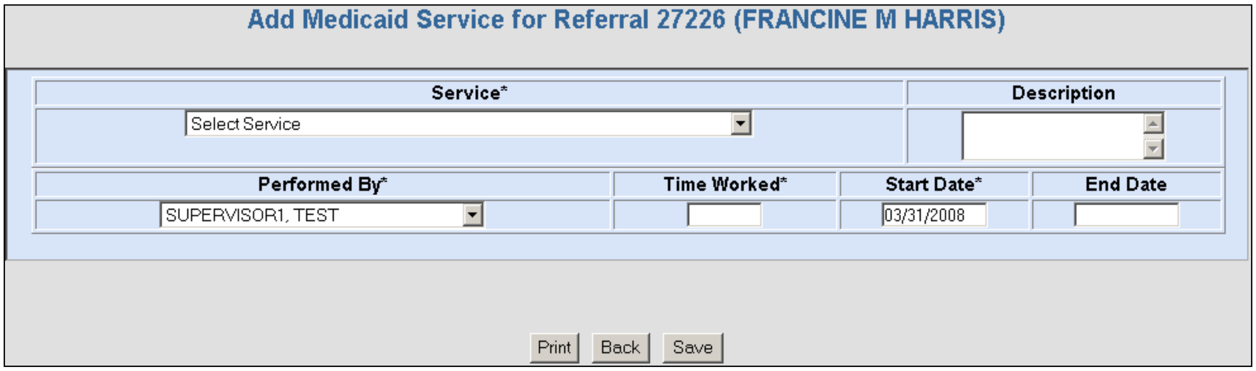
4.8.6.11 Delete Medicaid Service Button

Clicking the 

button will delete the selected Medicaid service from the Medicaid services page. Before clicking the delete Medicaid service button, you must first select a service by clicking the appropriate select radio button.

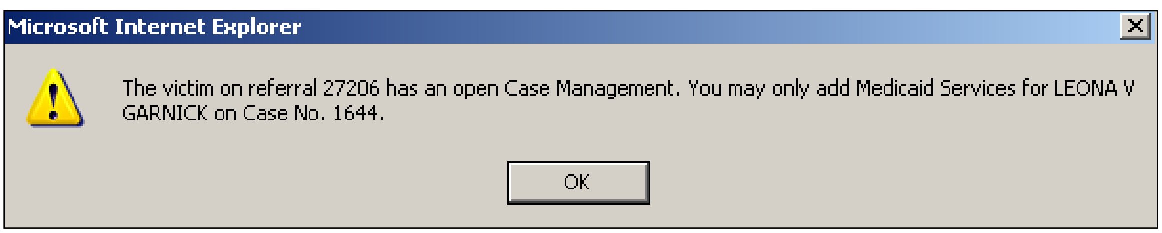
4.8.6.12 Add Medicaid Service Button

Clicking the Add Medicaid Service button will take you to the add page for Medicaid service information. The add Medicaid service page looks like this:



NOTE: Medicaid services should continue to be tracked every two weeks (according to policy). Multiple occurrences of the same service during any reporting period can be combined into one entry, with specifics entered in the description box. Total hours can then be entered in the TIME WORKED field.

NOTE: You cannot add services to a referral if the victim on that referral is already associated to an open case management. Because services must be associated with the case, you will receive a message that looks like this:



4.8.6.12.1 Service

You can use the service drop down list 

to select the Medicaid service that was provided to the client.

4.8.6.12.2 Description

The description box 

is a free-form text box where you can enter additional information for the Medicaid service that was provided to the client.

4.8.6.12.3 Performed By

You can use the performed by drop down list Performed By* Select Worker to select the name of the APS worker that performed the task on behalf of the client.

4.8.6.12.4 Time Worked

The time worked field Time Worked* is where you will enter the amount of time that was spent performing the Medicaid service task. Time worked must be entered in minutes.

4.8.6.12.5 Start Date

The start date field Start Date* 05/29/2005 will default the date the Medicaid service is being entered into the system. You can change the start date to a past date, if necessary.

4.8.6.12.6 End Date

The end date field End Date 05/23/2005 is where you can enter the end date for the Medicaid service. An end date can be entered on the add page if you are entering a service that has already been provided. Once the Medicaid service has been added, the end date can also be entered or modified directly on the Medicaid services page.

4.8.6.12.7 Print Button

Clicking the Print button will print the Medicaid services page. A print window will open where you can confirm your print details. If everything is correct, click the Print button on the print window. Click the Cancel button on the print window if you do not wish to print the Medicaid services page.

4.8.6.12.8 Back Button

Clicking the Back button will take you back to the Medicaid services page. If you have made any changes to the page, you will receive a message asking if you would like to save the information before returning to the Medicaid services page.

4.8.6.12.9 Save Button

Clicking the Save button will save the additions you have made to the page. Once the information has been saved, you will receive a confirmation message. You will remain on the add Medicaid service page so you can enter another Medicaid service, if necessary. If you do not need to add another Medicaid service, click the Back button to return to the Medicaid services page.

4.8.6.13 Print Button

Clicking the Print button will print the services page. A print window will open where you can confirm your print details. If everything is correct, click the Print button on the print window. Click the Cancel button on the print window if you do not wish to print the services page.

4.8.6.14 Back Button

Clicking the Back button will take you back to the referral page. If you have made any changes to the page, you will receive a message asking if you would like to save the information before returning to the case management page.

4.8.6.15 Save Button

Clicking the Save button will save the changes you have made to the page. Once the information has been saved, you will receive a confirmation message.

4.8.7 Save Referral Button

Clicking the Save Referral button will save any changes you made to the referral detail page. You will receive a confirmation message when your changes have been saved.